Contacts

please ™

An application template for
the *Please* data management system.

Hayes ™

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Introduction

The efficiency of your business can be greatly enhanced by a well-organized, always current source of contact information. Sales opportunities may slip by if you can't pinpoint the best customers. Keeping phone numbers and addresses up-to-date, and even finding that important phone number when you need it in a hurry, is difficult if your information is not easily handled and retrieved. The Contacts application, with the power of *Please*, organizes your sales information, helps you update it with minimum effort, and lets you easily access it the minute you need it.

With the Contacts application, you can easily accomplish the following tasks.

Locating key business contacts

This application maintains a list of contacts and a wealth of information about each. Use the Contacts application to produce instant lists of customers grouped by product, level of sales, location—whatever characteristic matters at the moment.

Generating mailing labels

After using the Contacts application to produce a list of customers you need to contact by mail, you can save time addressing letters by printing mailing labels with names and complete addresses. You can also generate, in the same operation, labels with your return address.

Tracking purchase levels

Enter sales data into the Contacts database whenever sales are made, and this application will give the information back to you in a variety of useful forms so you can tell who is buying what at the greatest or lowest rate.

Purging old records

When a contact is no longer current or useful, you can easily remove the appropriate record from your database, having first stored the information in another location so you can refer to it when needed.

What Do I Need?

The Contacts application is designed for use with *Please*. To use it, you need the *Please* program disk and User's Guide. All of the fields for this application are located on your Application disk. All you have to do is enter the names and data for each contact.

Gathering your information

An important beginning step toward using the Contacts application is to gather and organize your data for each of your customers. This will save you time when you actually begin entering information into your database.

Information needed for the Contacts application is defined by the field names of the database structure. For each field, information is entered and stored for future use.

Definition of Fields

The following are the Contacts fields and descriptions of the information you should have before you begin using the Contacts database. Field names are shown here as they appear in the actual database structure and in Quick Lists; some names appear in a slightly different form when displayed on the screen.

COMPANY: The name of the company you are doing business with is entered here.

OWNER-OR-HOLDING-CO.: The name of the company owner, or of the holding company, is entered here.

ADDRESS: The company's street address is entered here.

CITY: Enter the name of the city in which the company is located.

STATE: The state in which the company is located is identified here by standard postal abbreviation.

ZIP: The zip code for the company is entered here.

TELEPHONE: The company's telephone number is entered here.

KEY-CONTACT: The name of the person in the company that can assist you most with your usual business is entered here.

CONTACT-TITLE: The title or position of your key contact is entered here.

OTHER-CONTACT: Enter the name of an alternate contact within the company.

TYPE-OF-CUSTOMER: Categorize contacts with an entry in this field, such as DEALER, RETAILER, WHOLESALER, or DISTRIBUTOR.

PRODUCT-#1, #2, #3: Enter an identifier, of your own standard system, to identify product names/lines/groups.

PURCHASE LEVEL-#1, #2, #3: The purchase levels, in dollars, pounds, or numbers, are entered in these fields.

DATE-FIRST-CONTACT: The date of first contact with the customer is entered here.

PERSON-1ST-CONTACT: The name of your first contact within the company is entered here.

PERSON-ASSIGNED: The name of your regular, assigned contact within the company is entered here.

DATE-LAST-CONTACTED: The last date on which you spoke to your contact is entered here.

Modifying the Database Structure

The Contacts database contains the 21 predefined fields previously described. You may have certain needs that are not addressed by these fields. If so, *Please* allows you to add fields to the database structure, giving you the power to customize your database.

Note: After you add fields to the database, you must add them to the Special Screen Format. Even though added fields go to the bottom of the database structure, you can place them wherever you wish on the input screen. (See the *Please* User's Guide for details on Special Screen Formats.)

By the Way: If you wish to add new fields to the database structure, you must do so **before** adding any information to the database.

Warning: Do not delete any fields. You can change a field name to reflect other information you would like to keep, but deleting a field will destroy the Output Plans and Special Screen Format. Also, if you try to insert (rather than add) any fields, the Special Screen Format and all Output Plans will be destroyed.

The following are possible changes you may want to make to the database structure.

◨ If companies with which you do business deal with several different product lines, more PRODUCT fields could be added.

◨ If most of your business is done on credit, fields for noting Payment Terms and Discount Rates could be added.

When changing the database structure, refer to the original database structure listing in Appendix A. This listing shows how the fields have been defined for the Contacts database.

Entering Your Data

If you have the necessary information described in the "Definition of Fields" section, you are ready to begin entering data. You may want to make a backup copy of your Application disk before beginning. To do this, refer to Ready, Set, Go!, provided with the *Please* User's Guide.

When you are ready, start *Please* by following the instructions in Ready, Set, Go! The Master Menu will appear on your screen.

STEP 1: PRESS: **F1** To Choose a Database to Use

STEP 2: PRESS: **B** To specify the disk drive where the Application disk is stored

STEP 3: TYPE: [The number of the Contacts database] To select the Contacts database

PRESS: ←

STEP 4: PRESS: **F2** To begin entering names and information into your database

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Follow the prompts and enter the required data for each field, using the following guidelines:

- Enter all information in capital letters. This is not a requirement, but helps reduce confusion when generating reports.

- Decide on standard spellings and abbreviations for the information you are using.

- Press ◄─┘ to skip any field in which you do not need to enter information.

Once you have entered the contacts information and data, press **Esc** to return to the Master Menu.

Selecting Output Plans

Sixteen Output Plans are provided with this application. Each plan helps you perform a specific task, as described in the following pages.

The Output Plans are located on the Application diskette and are identified by a letter and number. The plan IDs for this application are:

L01   Customer and Key Contacts List
L02   Customer Purchase Levels and Totals
L03   Customers Not Contacted In Last Month
L04   Purchase Level by State
L05   Company Dealer List
L06   Assigned Contacts Within Company
L07   Customers with 0.00 Purchase Levels
L08   Purchase Levels in Descending Order
L09   Company Retail Customer List
L10   Individual Purchase Levels by Product
F01   Key Contact Mailing Labels
F02   Dealer Mailing Labels
F03   Retailer Mailing Labels
E01   Export to Word Processing
E50   Archive
R50   Purge Outdated Accounts

With *Please*, you can easily modify any or all of these plans, and can add additional plans of your own design. Appendix B provides the Output Plan listings and sample outputs generated by each plan. Refer to Appendix B when you need to modify any of the Output Plans.

The Output Plan included with the Contacts application are as follows.

☑ **Customer and Key Contacts List—L01**

The report generated by this Output Plan is a complete list of key contacts in all companies with which you do business. Included is the following information:

- Company name
- Key contact
- Telephone number

☑ **Customer Purchase Levels and Totals—L02**

You may occasionally need to make decisions based on a customer's projected purchase levels. When you need to verify customer projections, or simply want to identify a customer's purchase level at the moment, process this plan to produce a report with the following information:

- Company name
- Purchase level
- A summary of total, minimum, maximum, and average purchase levels.

▣ Customers Not Contacted in Last Month—L03

This plan lists the customers you haven't contacted within the last month. A handy reference for calls you may need to make soon, the list provides the following information:

- Company name
- Contact name
- Contact phone number
- Last contact date

▣ Purchase Level by State—L04

It is sometimes helpful to identify certain states where sales are either very good or very weak. This plan does both, by giving you the following information:

- Company names, grouped by State
- Purchase level of each company
- Purchase level subtotal of each State
- A summary report of total purchase level and minimum, maximum, and average levels

▣ Company Dealer List—L05

When you have a special deal or advertising offer, process this plan to produce a list of customers identified as DEALERS in Field 11. The list features the name of the company and the telephone number.

▣ Assigned Contacts Within Company—L06

You occasionally find yourself assigned to a contact within a company other than the person with whom you originally dealt. This plan produces a handy list of all records with an entry in the PERSON-ASSIGNED field, and includes:

- Company name
- Contact name
- Telephone number

▣ Customers With 0.00 Purchase Levels—L07

The best way to identify records no longer needed in your database is to know which customers are no longer purchasing from you. This plan produces a list of such customers. So that you may make a final contact before purging the appropriate records, the list includes the following:

- Company name
- Key contact
- Telephone number

- Purchase Levels in Descending Order—L08

  This Output Plan generates a list of all companies in your database, arranged in order of purchase level from highest to lowest. A summary at the bottom of the report shows the total, minimum, maximum, and average purchase levels.

- Company Retail Customer List—L09

  So that you may easily contact retail customers when you have a new product or advertising idea, this plan generates a list of company names and telephone numbers of all customers identified as RETAIL in the TYPE-OF-CUSTOMER field.

- Individual Purchase Levels by Product—L10

  Occasionally, you need more information than Output Plan L2 provides. When you want to know individual purchase levels by product, process this plan for a complete report as shown in Appendix B.

◻ **Key Contact Mailing Labels—F01**

This plan generates mailing labels for contacts. The labels feature the following information:

- Company name
- Name of key contact, on an ATTN line
- Full company address

◻ **Dealer Mailing Labels—F02**

This plan generates mailing labels for dealers with whom you do business, and features the following:

- Company name
- The word "Dealer"
- Full company address

◻ **Retailer Mailing Labels—F03**

Processing this plan produces two mailing labels per record; the first, a label for your addressee, features the following:

- Company name
- The word "Retailer"
- Full company address

The second is a return label featuring your name and full address. (**Note:** You must enter your name and address in the DEFINE statements.)

- **Export to Word Processing—E01**

  This plan exports names and addresses in a format that many word processing packages recognize, and proves useful in producing form letters.

- **Archive—E50**

  Before processing plan R50 to purge unneeded customer records, use this plan to archive them just in case they become needed in the future. (Complete instructions for Archiving records are provided in Appendix D.)

  To process plan E50, enter the desired date in the second SELECT line. For example, if you want to archive the records of all customers with a PURCHASE LEVEL of 0.00 for the last 6 months and today is 10/30/84, enter 4/30/84 in the plan's second SELECT line.

- **Purge Outdated Accounts—R50**

  This plan purges all customer records that have held a zero purchase level for over a year. If you want to maintain a record of past customers before purging with this plan, process plan E50 beforehand to archive the records you are about to delete from the database. The date you entered in the SELECT line in E50 must be entered in R50's second SELECT line.

Processing Output Plans

Once you have entered your information into the database and have decided the kind of information you need to retrieve, you are ready to process an Output Plan.

Select the Output Plan that suits your purpose. Start up *Please* and, from the Master Menu, begin the process below.

STEP 1: PRESS: **F5**   To begin processing an
                                       Output Plan

STEP 2: Enter the ID of the
         Output Plan you
         wish to process.

         PRESS: ←┘

STEP 3: PRESS **Y**   To indicate that you have
                                       selected the correct Output
                                       Plan

Follow the prompts displayed on your screen. If you find you need further information on processing Output Plans, refer to the *Please* User's Guide.

Producing a Quick List

When you need special information but don't have time to design your own Output Plan, use a Quick List for fast information retrieval. The Quick List allows you to easily produce the data you need, and can be designed with a few simple entries from the keyboard.

Quick Lists are especially suited to one-time retrievals; unlike Output Plans, they are not stored on disk for re-use. For complete details on completing a Quick List, refer to the *Please User's Guide.*

Appendix A: Database Structure Listing
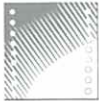
```
PLEASE                          DATABASE STRUCTURE            PAGE: 1
DATABASE: CONTACTS     DESC: Sales Contacts Information        DATE: 04/23/84

FLD#    FIELD NAME     TYPE LEN REQ    VALUE RANGE
=========================================================================
 1 COMPANY              C   35 Y DEF:
   (Key Field)                  LOW:
   (Duplicates=OK)              HI:
-------------------------------------------------------------------------
 2 OWNER-OR-HOLDING-CO. C   35 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 3 ADDRESS              C   30 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 4 CITY                 C   20 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 5 STATE                C    2 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 6 ZIP                  C   10 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 7 TELEPHONE            C   20 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 8 KEY-CONTACT          C   35 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
 9 CONTACT-TITLE        C   20 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
10 OTHER-CONTACT        C   35 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
11 TYPE-OF-CUSTOMER     C   20 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
12 PRODUCT-#1           C   20 N DEF:
                               LOW:
                               HI:
-------------------------------------------------------------------------
13 PURCHASE-LEVEL-#1   N/0  10 N DEF: 0
                               LOW: 0
                               HI:
-------------------------------------------------------------------------
```

```
FLD#   FIELD NAME      TYPE LEN REQ     VALUE RANGE
================================================================================
14 PRODUCT-#2           C    20 N DEF:
                                   LOW:
                                    HI:
--------------------------------------------------------------------------------
15 PURCHASE-LEVEL-#2   N/O   10 N DEF: 0
                                   LOW: 0
                                    HI:
--------------------------------------------------------------------------------
16 PRODUCT-#3           C    20 N DEF:
                                   LOW:
                                    HI:
--------------------------------------------------------------------------------
17 PURCHASE-LEVEL-#3   N/O   10 N DEF: 0
                                   LOW: 0
                                    HI:
--------------------------------------------------------------------------------
18 DATE-FIRST-CONTACT   D     6 N DEF:
                                   LOW:
                                    HI: TODAY
--------------------------------------------------------------------------------
19 PERSON-1ST-CONTACT   C    35 N DEF:
                                   LOW:
                                    HI:
--------------------------------------------------------------------------------
20 PERSON-ASSIGNED      C    35 N DEF:
                                   LOW:
                                    HI:
--------------------------------------------------------------------------------
21 DATE-LAST-CONTACTED  D     6 N DEF:
                                   LOW:
                                    HI: TODAY
--------------------------------------------------------------------------------


*** TOTAL RECORD LENGTH:  434
```
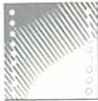
Appendix B: Output Plan Listings and Examples

The following pages present the Output Plans available with this application. Each Output Plan listing is shown on a left-hand page, and a sample output generated by the plan is on the following right-hand page. Refer to this appendix when you need to modify any Output Plans.

The Output Plans Directory is shown below.

```
PLEASE                        OUTPUT PLANS DIRECTORY            PAGE: 1
DATABASE: CONTACTS                                             DATE: 04/24/84
==================================================================================
LISTS:                                           PLMODFY  PLPROC  WIDTH  LENGTH
------------------------
L01 - CUSTOMER AND KEY CONTACTS LIST                1       1      80      66
L02 - CUSTOMER PURCHASE LEVELS AND TOTALS           1       1      80      66
L03 - CUSTOMERS NOT CONTACTED IN LAST MONTH         1       1      80      66
L04 - PURCHASE LEVEL BY STATE                       1       1      80      66
L05 - COMPANY DEALER LIST                           1       1      80      66
L06 - ASSIGNED CONTACTS WITHIN COMPANY              1       1      80      66
L07 - CUSTOMERS WITH 0.00 PURCHASE LEVELS           1       1      80      66
L08 - PURCHASE LEVELS IN DESCENDING ORDER           1       1      80      66
L09 - COMPANY RETAIL CUSTOMER LIST                  1       1      80      66
L10 - INDIVIDUAL PURCHASE LEVELS BY PRODUCT         1       1      80      66

FORMS:                                           PLMODFY  PLPROC  WIDTH  LENGTH
------------------------
F01 - KEY CONTACT MAILING LABELS                    1       1      50       6
F02 - DEALER MAILING LABELS                         1       1      50       6
F03 - RETAILER MAILING LABELS                       1       1      50      12

EXPORT FILES:                                    PLMODFY  PLPROC  M/Q/T
------------------------
E01 - EXPORT TO WORD PROCESSING                     1       1     1/Y/Y
E50 - ARCHIVE                                       1       1     1/Y/Y

FIELD REPLACEMENTS:                              PLMODFY  PLPROC  WIDTH  LENGTH
------------------------
R50 - PURGE OUTDATED ACCOUNTS                       1       1      0        0
```

===

Title: CUSTOMER AND KEY CONTACTS LIST   Form width: 80   Length: 66
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
     All records will be selected.

***** SORT CRITERIA *****
  1) [1] COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [8] KEY CONTACT

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   NONE

***** OUTPUT FIELDS *****
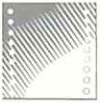   [1] COMPANY
   [8] KEY CONTACT
   [7] TELEPHONE

COMPANY TELEPHONE	KEY CONTACT
ABC DISTRIBUTORS 555-1212	FRED SMITH
BUSINESS OUTLET CO. 555-1212	BEN PETERSON
DEF ASSOCIATES 555-1212	VICTOR DOE
INTERSTATE SALES 555-5555	PAUL STONE
KLM INVESTMENTS 555-3456	JAMES JEFFERSON
WILLIAMS SUPPLY 555-1234	KELLY BENNETT

===
Title: CUSTOMER PURCHASE LEVELS AND TOTALS   Form width: 80   Length: 66
  Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   DEFINE [100] calc1   as [13]   + [15]
   DEFINE [101] calc2   as [100]   + [17]

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      All records will be selected.

***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [101] PURCHASE LEVEL

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   TOTAL on [101] PURCHASE LEVEL. Print MINIMUM. Print MAXIMUM. Print AVERAGE.

***** OUTPUT FIELDS *****
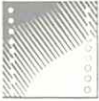   [1] COMPANY
   [101] PURCHASE LEVEL

```
                 COMPANY              PURCHASE LEVEL
==========================================================================
ABC DISTRIBUTORS                           1030000

BUSINESS OUTLET CO.                        4139998

DEF ASSOCIATES                             1230000

INTERSTATE SALES                           4669998

KLM INVESTMENTS                                  0

WILLIAMS SUPPLY                               6200


PURCHASE LEVEL   TOTAL:            11076196
                 RECORDS:     6
                 MINIMUM:                   0
                 MAXIMUM:             4669998
                 AVERAGE:             1846033
```

==
Title: CUSTOMERS NOT CONTACTED IN LAST MONTH   Form width: 80   Length: 66
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
    NONE

***** SELECTION CRITERIA *****
    Must pass ANY of the following SELECTS:
        SELECT [21] L 022884

***** SORT CRITERIA *****
    1) [1]   COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
    [8] CONTACT
    [21] LAST CONTACT

***** SUBTOTALS *****
    NONE

***** TOTALS *****
    NONE

***** OUTPUT FIELDS *****
    [1] COMPANY
    [8] CONTACT
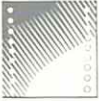   [7] TELEPHONE
    [21] LAST CONTACT

```
CUSTOMERS NOT CONTACTED IN LAST MONTH            DATE: 04/24/84   PAGE: 1
              COMPANY                                 CONTACT
         TELEPHONE      LAST CONTACT
==================================================================================
DEF ASSOCIATES                         VICTOR DOE
555-1212               01/21/84

INTERSTATE SALES                       PAUL STONE
555-5555               01/01/84

WILLIAMS SUPPLY                        KELLY BENNETT
555-1234               04/05/83
```

```
PLEASE                      PLAN L04 LISTING              PAGE: 1
DATABASE: CONTACTS                                        DATE: 04/25/84
===================================:==================================:======
Title: PURCHASE LEVEL BY STATE               Form width: 80   Length: 66
 Modification Password Level: 1    Process Password Level: 1
Space Between Lines: 0

***** DEFINED FIELDS *****
   DEFINE [100] sub1              as [13]         +  [15]
   DEFINE [101] sub2              as [100]        +  [17]

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      All records will be selected.

***** SORT CRITERIA *****
   1) [  5]  STATE (Ascending)
   2) [  1]  COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [101] PURCHASE LEVEL

***** SUBTOTALS *****
   SUBTOTAL on [101] PURCHASE LEVEL when [  5] STATE changes.

***** TOTALS *****
   TOTAL on [101] PURCHASE LEVEL. Print MINIMUM. Print MAXIMUM. Print AVERAGE.

***** OUTPUT FIELDS *****
   [  1] COMPANY
   [101] PURCHASE LEVEL
```
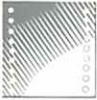
```
PURCHASE LEVEL BY STATE                          DATE: 04/24/84   PAGE: 1

              COMPANY                    PURCHASE LEVEL
================================================================================
DEF ASSOCIATES                               1230000
STATE: CA
   PURCHASE LEVEL SUBTOTAL:                  1230000

WILLIAMS SUPPLY                                 6200
STATE: FL
   PURCHASE LEVEL SUBTOTAL:                     6200

ABC DISTRIBUTORS                             1030000
BUSINESS OUTLET CO.                          4139998
STATE: GA
   PURCHASE LEVEL SUBTOTAL:                  5169998

INTERSTATE SALES                             4669998
STATE: OR
   PURCHASE LEVEL SUBTOTAL:                  4669998

KLM INVESTMENTS                                    0
STATE: TX
   PURCHASE LEVEL SUBTOTAL:                        0


PURCHASE LEVEL   TOTAL:                      11076196
                RECORDS:        6
                MINIMUM:                           0
                MAXIMUM:                     4669998
                AVERAGE:                     1846033
```

29
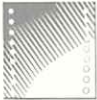
```
PLEASE                        PLAN L05 LISTING              PAGE: 1
DATABASE: CONTACTS                                          DATE: 04/25/84
================================================================================
Title: COMPANY DEALER LIST                    Form width: 80    Length: 66
 Modification Password Level: 1    Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
    NONE

***** SELECTION CRITERIA *****
    Must pass ANY of the following SELECTS:
        SELECT [ 11] E @DEALER

***** SORT CRITERIA *****
    1) [  1]  DEALER (Ascending)

***** ALTERNATE HEADINGS *****
    [  1] DEALER

***** SUBTOTALS *****
    NONE

***** TOTALS *****
    NONE

***** OUTPUT FIELDS *****
    [  1] DEALER
    [  7] TELEPHONE
```
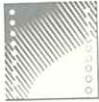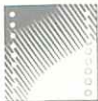
DEALER	TELEPHONE
ABC DISTRIBUTORS	555-1212
DEF ASSOCIATES	555-1212
INTERSTATE SALES	555-5555

```
PLEASE                          PLAN LO6 LISTING               PAGE: 1
DATABASE: CONTACTS                                             DATE: 04/25/84
================================================================================
Title: ASSIGNED CONTACTS WITHIN COMPANY          Form width: 80   Length: 66
 Modification Password Level: 1    Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      All records will be selected.

***** SORT CRITERIA *****
   1) [  1]  COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [ 20] PERSON ASSIGNED

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   NONE

***** OUTPUT FIELDS *****
   [  1] COMPANY
   [ 20] PERSON ASSIGNED
   [  7] TELEPHONE
```

COMPANY TELEPHONE	PERSON ASSIGNED
ABC DISTRIBUTORS 555-1212	MIKE JONES
BUSINESS OUTLET CO. 555-1212	BEN PETERSON
DEF ASSOCIATES 555-1212	MIKE SMITH
INTERSTATE SALES 555-5555	ANNE SMITH
KLM INVESTMENTS 555-3456	KATHY MILLER
WILLIAMS SUPPLY 555-1234	JOHN LEWIS

===

Title: CUSTOMERS WITH 0.00 PURCHASE LEVELS   Form width: 80   Length: 66
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      SELECT [13] E 0, AND [15] E 0, AND [17] E 0
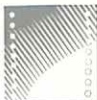
***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [8] KEY CONTACT

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   NONE

***** OUTPUT FIELDS *****
   [1] COMPANY
   [7] TELEPHONE
   [8] KEY CONTACT

COMPANY	TELEPHONE
KEY CONTACT	
==========	==========
KLM INVESTMENTS	555-3456
JAMES JEFFERSON	

==
Title: PURCHASE LEVELS IN DESCENDING ORDER   Form width: 80   Length: 66
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 0

***** DEFINED FIELDS *****
   DEFINE [100] calc1   as [13]   + [15]
   DEFINE [101] calc2   as [100]   + [17]

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
     All records will be selected.

***** SORT CRITERIA *****
   1) [101] PURCHASE LEVEL (Descending)

***** ALTERNATE HEADINGS *****
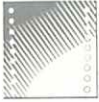   [101] PURCHASE LEVEL

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   TOTAL on [101] PURCHASE LEVEL. Print MINIMUM. Print MAXIMUM. Print AVERAGE.

***** OUTPUT FIELDS *****
   [1] COMPANY
   [101] PURCHASE LEVEL

COMPANY	PURCHASE LEVEL
INTERSTATE SALES	4669998
BUSINESS OUTLET CO.	4139998
DEF ASSOCIATES	1230000
ABC DISTRIBUTORS	1030000
WILLIAMS SUPPLY	6200
KLM INVESTMENTS	0

```
PURCHASE LEVEL   TOTAL:            11076196
                RECORDS:     6
                MINIMUM:                  0
                MAXIMUM:            4669998
                AVERAGE:            1846033
```

==
Title: COMPANY RETAIL CUSTOMER LIST   Form width: 80   Length: 66
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      SELECT [11] E @RETAIL

***** SORT CRITERIA *****
   1) [1] RETAIL CUSTOMER (Ascending)

***** ALTERNATE HEADINGS *****
   [1] RETAIL CUSTOMER

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   NONE

***** OUTPUT FIELDS *****
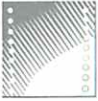   [1] RETAIL CUSTOMER
   [7] TELEPHONE

```
COMPANY RETAIL CUSTOMER LIST                          DATE: 04/24/84    PAGE: 1
                RETAIL CUSTOMER               TELEPHONE
================================================================================
BUSINESS OUTLET CO.               555-1212

KLM INVESTMENTS                   555-3456

WILLIAMS SUPPLY                   555-1234
```

```
PLEASE                          PLAN L10 LISTING              PAGE: 1
DATABASE: CONTACTS                                            DATE: 04/25/84
=============================================================================
Title: INDIVIDUAL PURCHASE LEVELS BY PRODUCT      Form width: 80    Length: 66
 Modification Password Level: 1     Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      All records will be selected.

***** SORT CRITERIA *****
   1) [   1]  COMPANY (Ascending)

***** ALTERNATE HEADINGS *****
   [ 13] AMOUNT 1
   [ 15] AMOUNT 2
   [ 17] AMOUNT 3
   [ 12] PRODUCT 1
   [ 14] PRODUCT 2
   [ 16] PRODUCT 3

***** SUBTOTALS *****
   NONE

***** TOTALS *****
   TOTAL on [ 13] AMOUNT 1. Print MINIMUM. Print MAXIMUM. Print AVERAGE.
   TOTAL on [ 15] AMOUNT 2. Print MINIMUM. Print MAXIMUM. Print AVERAGE.
   TOTAL on [ 17] AMOUNT 3. Print MINIMUM. Print MAXIMUM. Print AVERAGE.

***** OUTPUT FIELDS *****
   [  1] COMPANY
   [ 12] PRODUCT 1
   [ 13] AMOUNT 1
   [  1] COMPANY
   [ 14] PRODUCT 2
   [ 15] AMOUNT 2
   [  1] COMPANY
   [ 16] PRODUCT 3
   [ 17] AMOUNT 3
```

| COMPANY | PRODUCT 1 | AMOUNT 1 |
| COMPANY | PRODUCT 2 | AMOUNT 2 |
COMPANY	PRODUCT 3	AMOUNT 3
ABC DISTRIBUTORS	PINS	500000
ABC DISTRIBUTORS	PENS	30000
ABC DISTRIBUTORS	NEEDLES	500000
BUSINESS OUTLET CO.	PENS	59999
BUSINESS OUTLET CO.	TACKS	79999
BUSINESS OUTLET CO.	PENCILS	4000000
DEF ASSOCIATES	TACKS	30000
DEF ASSOCIATES	PENS	200000
DEF ASSOCIATES	PINS	1000000
INTERSTATE SALES	INK	599999
INTERSTATE SALES	PENS	69999
INTERSTATE SALES	TACKS	4000000
KLM INVESTMENTS	TACKS	0
KLM INVESTMENTS	PAPER	0
KLM INVESTMENTS	PINS	0
WILLIAMS SUPPLY	PENS	2000
WILLIAMS SUPPLY	TACKS	4000
WILLIAMS SUPPLY	INK	200

```
AMOUNT 1   TOTAL:           1191998
           RECORDS:     6
           MINIMUM:                0
           MAXIMUM:           599999
           AVERAGE:           198666

AMOUNT 2   TOTAL:            383998
           RECORDS:     6
           MINIMUM:                0
           MAXIMUM:           200000
           AVERAGE:            64000

AMOUNT 3   TOTAL:           9500200
           RECORDS:     6
           MINIMUM:                0
           MAXIMUM:          4000000
           AVERAGE:          1583367
```

==
Title: KEY CONTACT MAILING LABELS   Form width: 50   Length: 6
 Modification Password Level: 1   Process Password Level: 1
Alignment Mark: . at Line: 1 Column: 1

***** DEFINED FIELDS *****
   DEFINE [100] ATTN   as 'ATTN:'

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
     All records will be selected.

***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** OUTPUT FIELDS *****
   [1] COMPANY at Line   1 and Column   1
   [100] ATTN at Line   2 and Column   1
   [8] KEY-CONTACT at Line   2 and Column   7
   [3] ADDRESS at Line   3 and Column   1
   [4] CITY at Line   4 and Column   1
   [5] STATE at Line   4 and Column 21
   [6] ZIP at Line   5 and Column 15

```
ABC DISTRIBUTORS
ATTN: FRED SMITH
121 MAIN ST.
ANYCITY              GA
            00001

BUSINESS OUTLET CO.
ATTN: BEN PETERSON
111 PINE LANE
ANYTOWN              GA
            00001

DEF ASSOCIATES
ATTN: VICTOR DOE
22 SECOND AVE.
ANYCITY              CA
            00001

INTERSTATE SALES
ATTN: PAUL STONE
838 E. PINE ST.
ANYTOWN              OR
            01010

KLM INVESTMENTS
ATTN: JAMES JEFFERSON
444 S. PINE LANE
ANYTOWN              TX
            00001

WILLIAMS SUPPLY
ATTN: KELLY BENNETT
333 E. BROADWAY
ANYCITY              FL
            01010
```
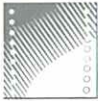
```
PLEASE                      PLAN FO2 LISTING              PAGE: 1
DATABASE: CONTACTS                                        DATE: 04/25/84
=====================================================================
Title: DEALER MAILING LABELS                Form width: 50    Length: 6
 Modification Password Level: 1    Process Password Level: 1
Alignment Mark: .  at Line: 1 Column: 1

***** DEFINED FIELDS *****
    DEFINE [100] DEALER              as 'Dealer'

***** SELECTION CRITERIA *****
    Must pass ANY of the following SELECTS:
       SELECT [ 1] E @DEALER

***** SORT CRITERIA *****
    1) [  1]  COMPANY (Ascending)

***** OUTPUT FIELDS *****
    [   1] COMPANY at Line    1 and Column    1
    [100] DEALER at Line    2 and Column    1
    [   3] ADDRESS at Line    3 and Column    1
    [   4] CITY at Line    4 and Column    1
    [   5] STATE at Line    4 and Column   22
    [   6] ZIP at Line    5 and Column   15
```

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ABC DISTRIRUTORS
Dealer
121 MAIN ST.
ANYCITY   GA
                  00001

DEF ASSOCIATES
Dealer
22 SECOND AVE.
ANYCITY   CA
                  00001

INTERSTATE SALES
Dealer
838 E. PINE ST.
ANYTOWN   OR
                  01010

===
Title: RETAILER MAILING LABELS   Form width: 50   Length: 12
 Modification Password Level: 1   Process Password Level: 1
Alignment Mark: . at Line: 1 Column: 1

***** DEFINED FIELDS *****
   DEFINE [100] name   as 'Your name'
   DEFINE [101] addr   as 'Your address'
   DEFINE [102] city,state   as 'City, State'
   DEFINE [103] zip   as 'Zip'
   DEFINE [104] retailer   as 'Retailer'

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      SELECT [11] E @RETAIL

***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** OUTPUT FIELDS *****
   [100] name at Line   1 and Column   1
   [101] addr at Line   2 and Column   1
   [102] city,state at Line   3 and Column   1
   [103] zip at Line   4 and Column 15
   [1] COMPANY at Line   7 and Column   1
   [104] retailer at Line   8 and Column   1
   [3] ADDRESS at Line   9 and Column   1
   [4] CITY at Line 10 and Column   1
   [5] STATE at Line 10 and Column 22
   [6] ZIP at Line 11 and Column 15

```
Your name
Your address
City, State
            Zip

BUSINESS OUTLET CO.
Retailer
111 PINE LANE
ANYTOWN                GA
            00001

Your name
Your address
City, State
            Zip

KLM INVESTMENTS
Retailer
444 S. PINE LANE
ANYTOWN                TX
            00001

Your name
Your address
City, State
            Zip

WILLIAMS SUPPLY
Retailer
333 E. BROADWAY
ANYCITY                FL
            01010
```

===
Title: EXPORT TO WORD PROCESSING   Method: 1 Quotes: Y Trim: Y
 Modification Password Level: 1   Process Password Level: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ANY of the following SELECTS:
      All records will be selected.

***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** OUTPUT FIELDS *****
   [8] KEY-CONTACT
   [1] COMPANY
   [3] ADDRESS
   [4] CITY
   [5] STATE
   [6] ZIP

==

Title: ARCHIVE   Method: 1 Quotes: Y Trim: Y
 Modification Password Level: 1   Process Password Level: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ALL of the following SELECTS:
      SELECT [13] E 0, AND [15] E 0, AND [17] E 0
      SELECT [21] L 041583

***** SORT CRITERIA *****
   1) [1] COMPANY (Ascending)

***** OUTPUT FIELDS *****
   [1] COMPANY
   [2] OWNER-OR-HOLDING-CO.
   [3] ADDRESS
   [4] CITY
   [5] STATE
   [6] ZIP
   [7] TELEPHONE
   [8] KEY-CONTACT
   [9] CONTACT-TITLE
   [10] OTHER-CONTACT
   [11] TYPE-OF-CUSTOMER
   [12] PRODUCT-#1
   [13] PURCHASE-LEVEL-#1
   [14] PRODUCT-#2
   [15] PURCHASE-LEVEL-#2
   [16] PRODUCT-#3
   [17] PURCHASE-LEVEL-#3
   [18] DATE-FIRST-CONTACT
   [19] PERSON-1ST-CONTACT
   [20] PERSON-ASSIGNED
   [21] DATE-LAST-CONTACTED

===
Title: PURGE OUTDATED ACCOUNTS   Form width: 0   Length: 0
 Modification Password Level: 1   Process Password Level: 1
Space Between Lines: 1

***** DEFINED FIELDS *****
   NONE

***** SELECTION CRITERIA *****
   Must pass ALL of the following SELECTS:
      SELECT [13] E 0, AND [15] E 0, AND [17] E 0
      SELECT [21] L 041583

***** ALL RECORDS SELECTED WILL BE DELETED *****

Appendix C: Input Screens

The following are the screens that appear when you enter data into the Contacts database.

```
Scr: 1 of 3 Database: CONTACTS Desc: Sales Contacts Information          Dup: Y

                              GENERAL INFORMATION

            1) COMPANY:
            2) OWNER OR HOLDING CO.:
            3) ADDRESS:
            4) CITY:                        5) STATE:
            6) ZIP:

            7) TELEPHONE:

            8) KEY CONTACT:
            9) CONTACT TITLE:



                          PRESS RETURN FOR NEXT SCREEN

       Enter key field data or F2=Scan Fwd, F3=1st Record, F4=Last Record, F7=SetScan
```

CONTACTS INFORMATION

10) OTHER CONTACT:

11) DATE FIRST CONTACTED:
12) PERSON CONTACTED:

13) PERSON ASSIGNED:
14) DATE LAST CONTACTED:

15) TYPE OF CUSTOMER:

PRESS RETURN FOR NEXT SCREEN

PRODUCT INFORMATION

16) PRODUCT:
17) PURCHASE LEVEL:

18) PRODUCT:
19) PURCHASE LEVEL:

20) PRODUCT:
21) PURCHASE LEVEL:

LAST SCREEN

Appendix D: Archiving Contact Records

As time passes, you may find it helpful to archive records that are no longer an integral part of your database. When records are archived, they remain available for future reference as needed, but are removed from the working database. This keeps your information current and allows more room in the database for new information.

The following steps explain how to archive records with the Contacts application.

Note: If you have added fields to the structure of any database you wish to archive, you must add these same fields to the "Output Fields" section of the E50 Output Plan structure. Refer to the *Please* User's Guide for instructions on modifying an Output Plan.

Select the Contacts Database and, from the Master Menu, begin the steps below.

STEP 1: PRESS:	F5	To select the Process an Output Plan function
STEP 2: TYPE:	E50	To process Output Plan E50
	PRESS: ↵	
STEP 3: PRESS:	Y	To indicate that you have selected the correct Output Plan

When this plan has been processed, you are returned to the Master Menu. Output Plan E50 has created a file named CONTACTS.PRN on your data disk; this file contains all archived records. You now need to set up a database to contain these archived records. To do this you will:

1. Copy the Contacts database structure to an Archive database.

2. Import the CONTACTS.PRN records into the Archive database. (Whenever you process Output Plan E50 in the future, you will need to do this again to put the archived records in the Archive database.)

To copy the Contacts database structure to an Archive database, follow the steps below.

STEP 1:	PRESS:	**F1**	To Choose a Database to Use
STEP 2:	PRESS:	**B**	To specify the disk drive where the database is stored
STEP 3:	Enter the number of the Contacts database		
	PRESS:	⏎	
STEP 4:	PRESS:	**F6**	To access the Database Utilities Menu
STEP 5:	PRESS:	**F2**	To copy the Contacts database structure
STEP 6:	TYPE:	[a name for the Archive database]	
STEP 7:	PRESS:	**B**	To specify the disk drive where the Archive database will be copied

When the copy has been made, you are returned to the Master Menu. You are now ready to import the archived records to the Archive database. (Again, every time you archive records, you will follow these steps.)

STEP 8:	PRESS:	**F1**	To Choose a Database to Use
STEP 9:	PRESS:	**B**	To specify the disk drive where the Archive database is stored.
STEP 10:	Enter the number of the Archive database		
STEP 11:	PRESS:	**F6**	To access the Database Utilities Menu
STEP 12:	PRESS:	**F5**	To begin importing a file
STEP 13:	TYPE:	**B: CONTACTS.PRN**	To specify the file to be imported
	PRESS:	↵	
STEP 14:	PRESS:	**1**	To indicate the import method to be used
STEP 15:	PRESS:	**Y**	To proceed with importing

The archived records are now stored in your Archive database. and you can delete them from the Contacts database with the steps below.

STEP 16:	PRESS:	**F1**	To Choose a Database to Use
STEP 17:	PRESS:	**B**	To specify the disk drive where the Contacts database is stored
STEP 18:	Enter the number of the Contacts database		
STEP 19:	PRESS:	**F5**	To process an Output Plan
STEP 20:	TYPE:	**R50**	To process Output Plan R50
	PRESS:	⏎	
STEP 21:	PRESS:	**Y**	To indicate that you have selected the correct Output Plan

When all archived records are deleted from the Contacts database. you are returned to the Master Menu.

Appendix E: Copying Databases from One Disk Drive to Another

A utility program called DBCOPY is supplied on your *Please* Sample Data Disk. Use this program to copy any *Please* database from one disk to another. As this utility is separate from the *Please* program, you must exit *Please* to use DBCOPY.

After exiting *Please*, insert the Sample Data Disk in drive A. At the A> prompt, begin the steps below.

STEP 1: PRESS: **DBCOPY**   To begin the copy process

PRESS: ↵

STEP 2: Remove the Sample Data Disk and insert the disk containing the database to copy in drive A

STEP 3: Insert the blank disk on which the copy will be made in drive B

STEP 4: PRESS: ↵   To indicate that both disks are in place

STEP 5: TYPE: [The name of the database to be copied]

PRESS: ↵

STEP 6: PRESS: **A**   To specify the disk drive con-
                                             taining the database to be
                                             copied

STEP 7: TYPE: [A name for
                 the database copy]

         PRESS: ←⏎

STEP 8: PRESS: **B**   To specify the disk drive
                                             where the copy will be
                                             stored

STEP 9: PRESS: **Y**   To proceed with the copy
                                             process

When the copy process is complete, a message is displayed, as
are instructions for completing the procedure.

If you receive an error message, refer to Appendix D of the
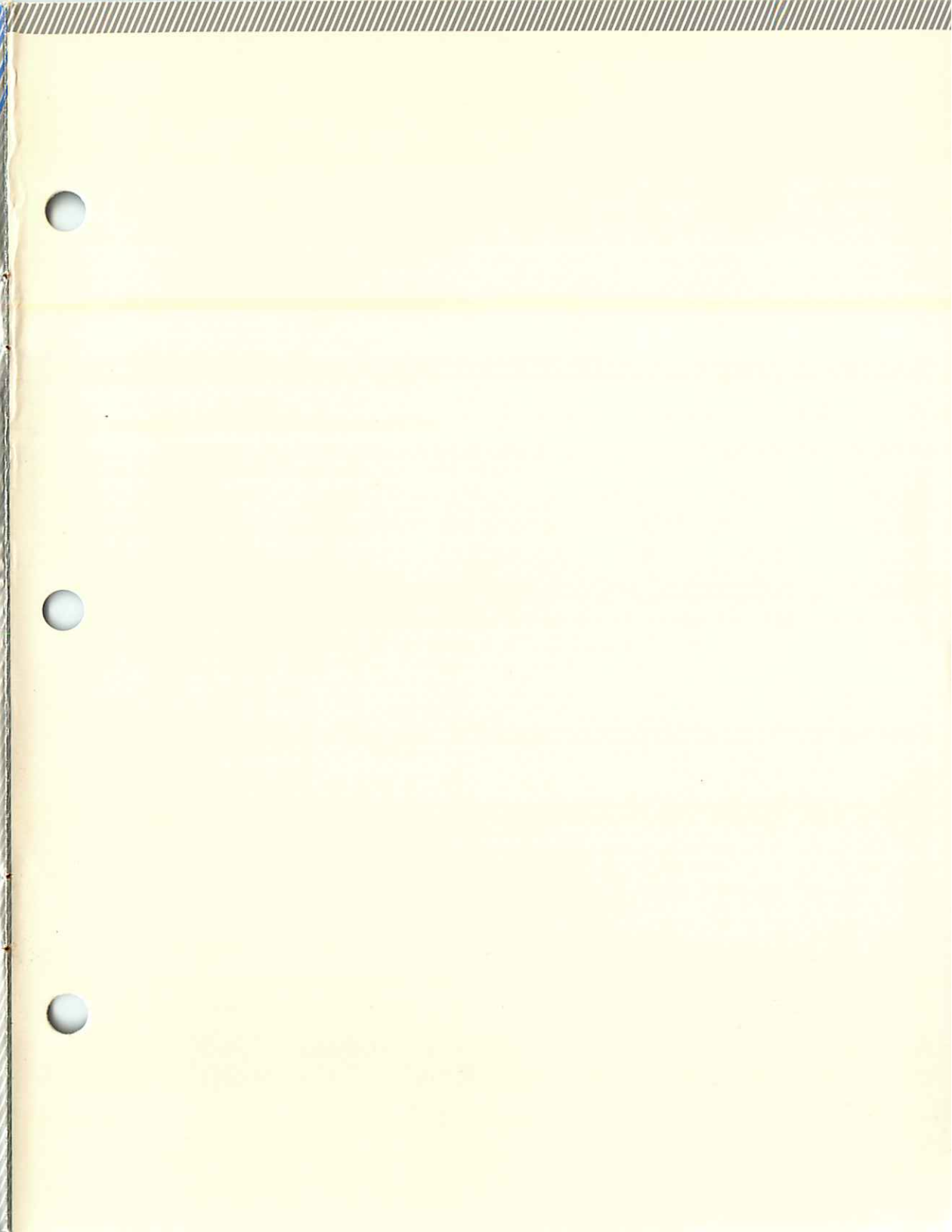*Please* User's Guide for corrective action.

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Notes

Notes

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98-00027